Homeless Prevention Services [HPS] Workflow

2022

Bitfocus

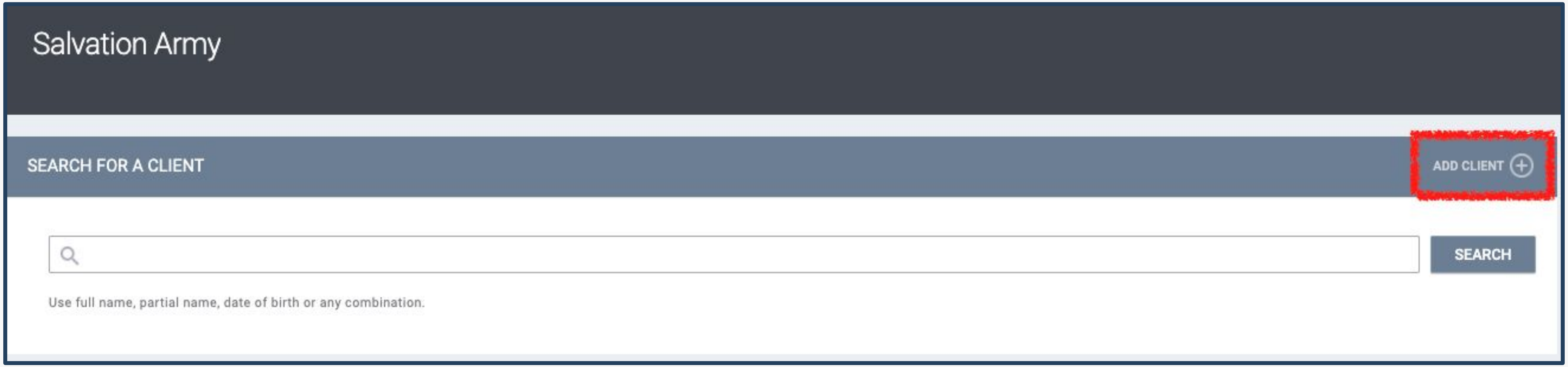
Overview - *What Today's Training Will Cover*

- Introductions
- Client Entry Refresher
- Reviewing the Release of Information (ROI)
- Entering Case Notes - *Clients Not Enrolled in Program*
- Household Configuration
- Administering and Entering the HPAT Assessment
- Enrolling Household in Program
- Providing Services
- Administering and Entering the Status Update
- Exiting Household
- Live Demonstration
- Q& A

CLIENT ENTRY REFRESHER

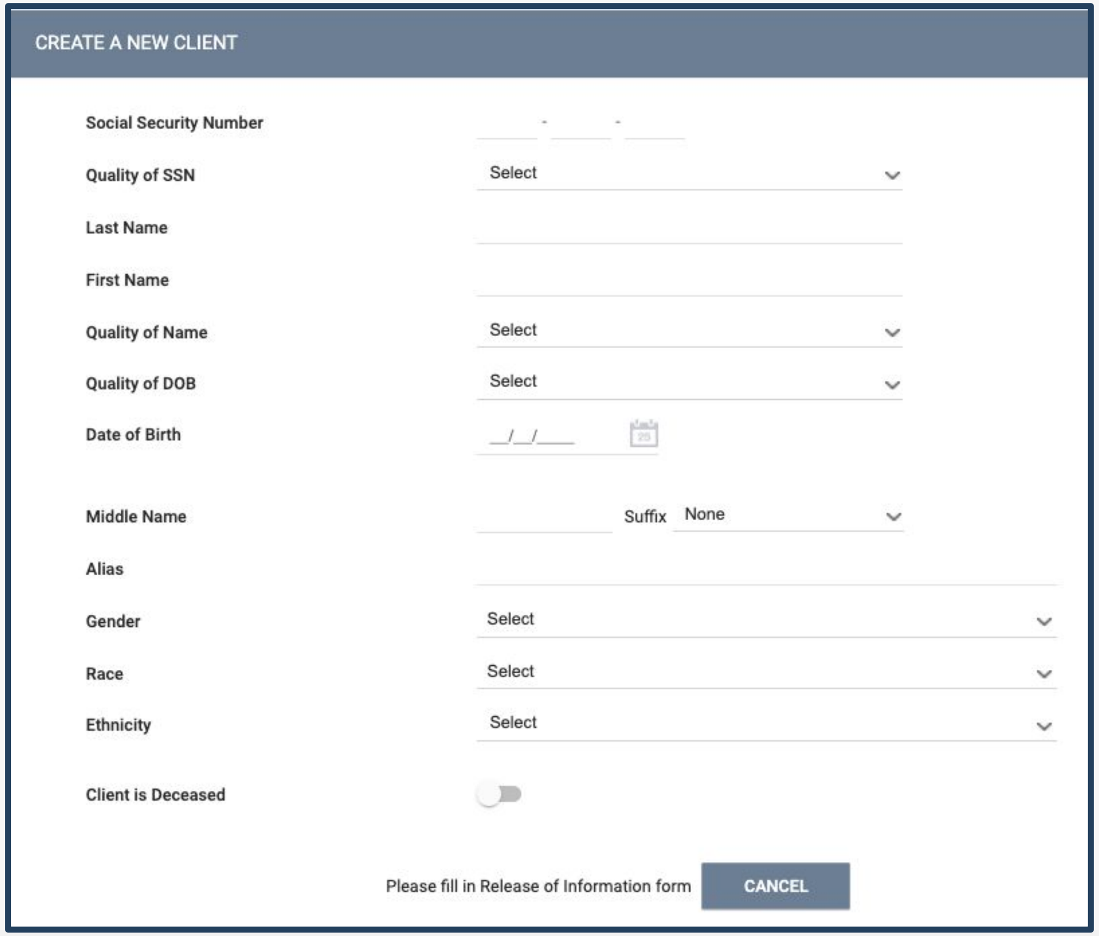
Client Entry Refresher - *How Do I Create a New Client Record?*

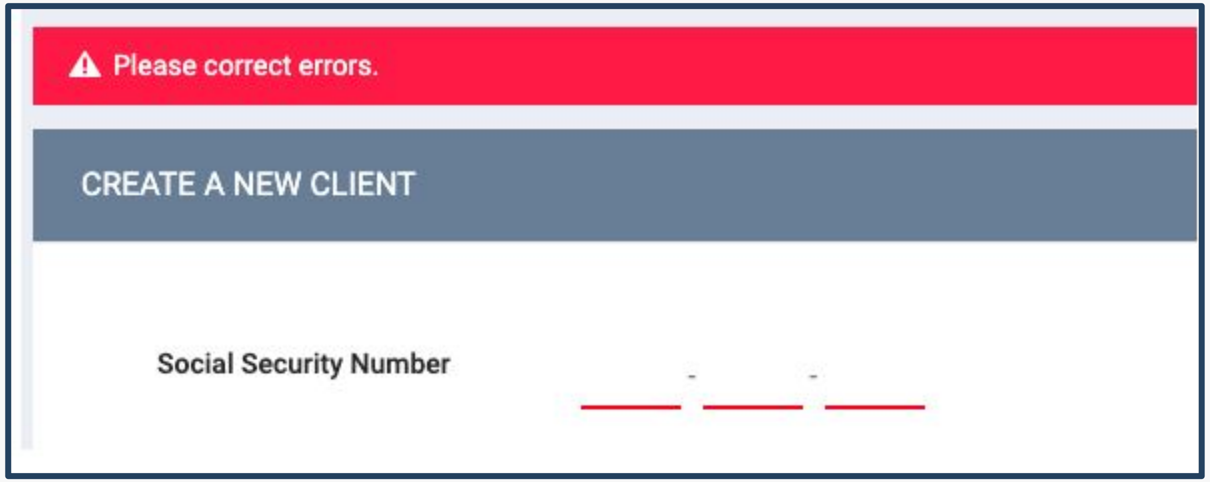
1. Log into HMIS
2. Search for Client in the search bar to determine they do not already have a profile in HMIS
3. If you determine the client does not exist in HMIS, proceed to ADD CLIENT from the search tab
4. Mouse over and click on the **ADD CLIENT** to begin entry



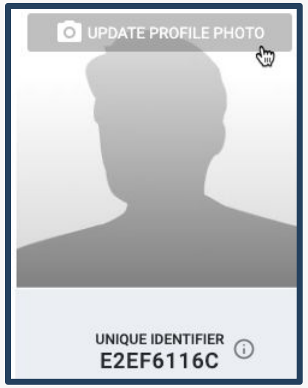
Client Entry Refresher - *How Do I Create a New Client Record?*

From the **CREATE A NEW CLIENT** page you will record core data about the client. Certain fields are required before you can save a record. A banner will appear to indicate the record cannot be saved.





To add a client photo to the client record, hover over the default Client Profile image and click **UPDATE PROFILE PHOTO.**



Reviewing the Release of Information (ROI)

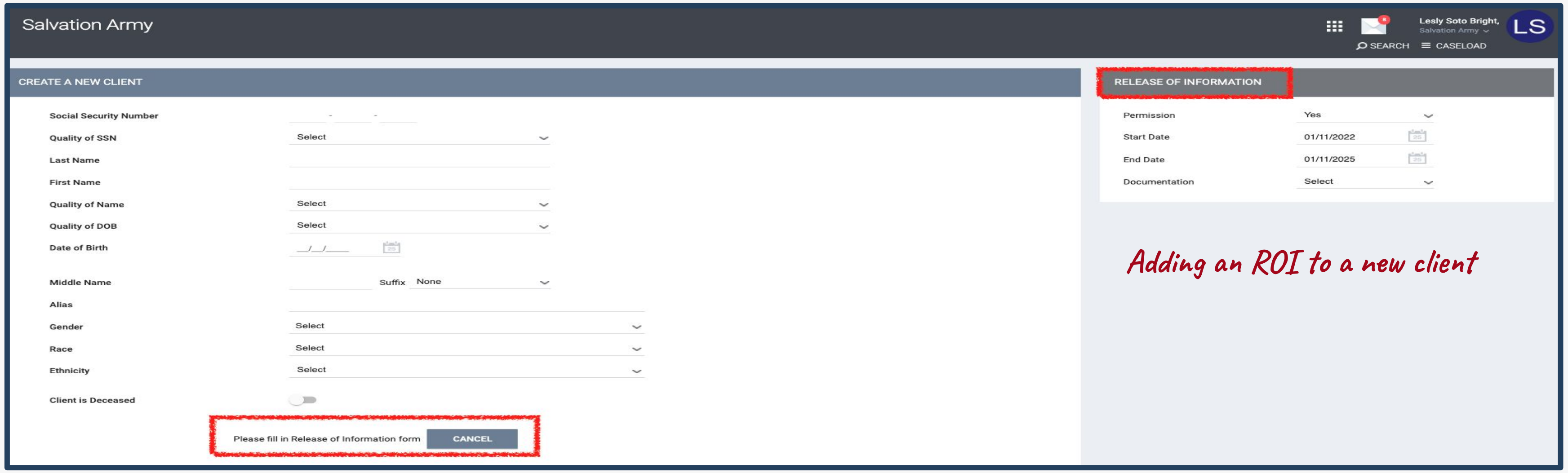
Reviewing the Release of Information - *ROI Overview*

No client information may be added or updated in HMIS until a client signs a valid consent form and uploaded to the system.

- A signed release of information must be uploaded for every member of the household.
- Each client consent must set a specific expiration date in order for the ROI to be valid.
- Clients must initial the boxes in the left-hand column of the ROI to give consent for collecting and sharing of each type of HIPAA-protected information listed in the right-hand column of the ROI.

Reviewing the Release of Information - *ROI Overview*

- After creating a new client you will be required to upload the ROI; without it you will not be able to save the record.
- If it is an existing client you should review what the client has consented to by reviewing the uploaded ROI file.
- Please note you will need to enter a start and end date for the ROI



Reviewing the Release of Information - *ROI Overview*

Client initials	Type of PPI/PHI
1	• Identifying information (including: name, birth date, gender, race, ethnicity, social security number, phone number, residence address, or other similar identifying information)
2	• My photograph or other likeness
3	• Medical information included in my responses to questions asked as part of the standard HMIS intake and identification as a client or patient of the Santa Clara Valley Health and Hospital System
4	• HIV/AIDS-related information included in my responses to questions asked as part of the standard HMIS intake
5	• Mental health information included in my responses to questions asked as part of the standard HMIS intake and identification as a client receiving mental health services from the County's Behavioral Health Services Department
6	• Substance abuse treatment information included in my responses to questions asked as part of the standard HMIS intake and identification as a client receiving substance abuse or alcohol treatment from the County's Behavioral Health Services Department
7	• Financial and benefits information (including: employment status, income verification, public assistance payments or allowances, food stamp allotments, health care coverage, or other similar financial or benefits information)
8	• Housing information
9	• Information about services provided by HMIS Partner Agencies (including: date, duration, and type of service; and other similar service information)
10	• Other (specify): ______________________________

If a client does not initial the following boxes the information cannot be entered into HMIS:

- #1 (identifying information) create an anonymous profile
- #3, 5, 6, 7, or 8 respectively impacts the information entered in HMIS related to the assessment.
    - This may impact their scoring in HMIS.
    - Switch to paper HPAT and enter **Eligibility Exception Service** to record correct score.
- #9 impacts the service transactions (Ex: United way Seasons of Sharing,) we can record for the household
- #2, 4 or 10 does not impact the information entered for HP or assessment score.

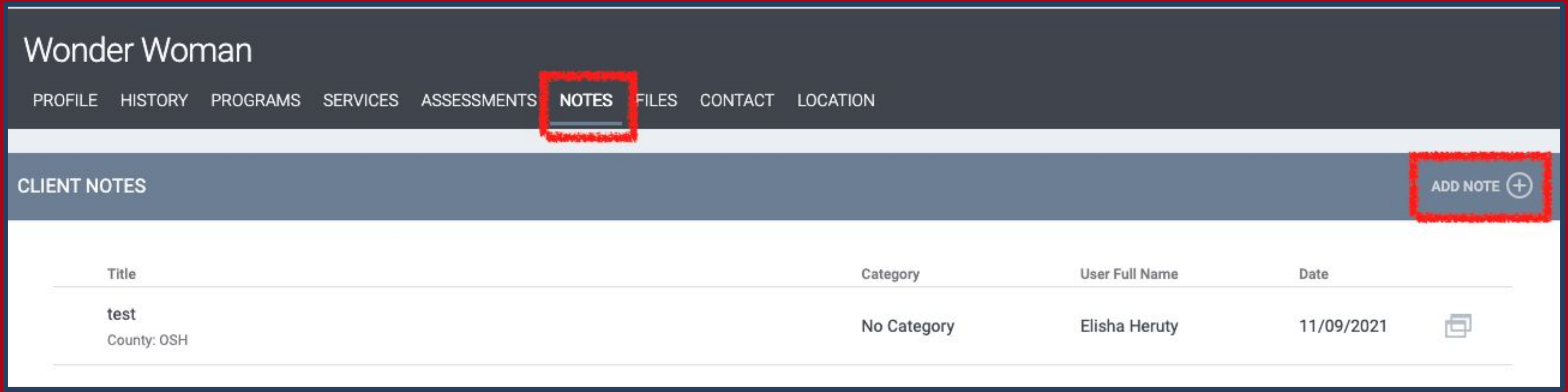
***Refusal to have data entered into HMIS will not affect the client's eligibility for benefits or services, or ability to obtain treatment or payment.*

Entering Case Notes
Client Not Enrolled in Program

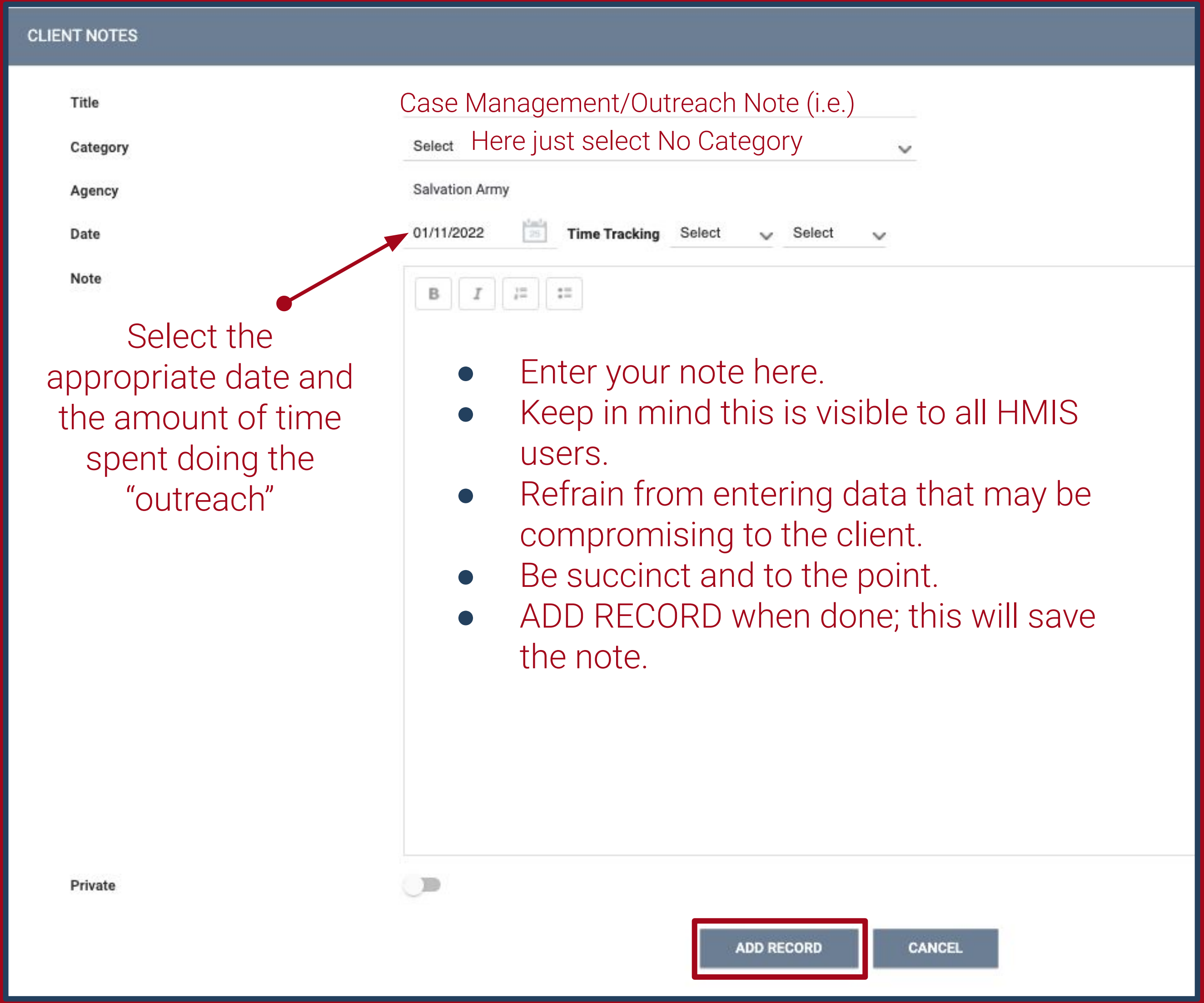
Entering Case Notes - *For clients not enrolled in program*

Have clients that you have completed outreach for, but will not enroll into program? Here is what you can do:

- Use **NOTES** section in HMIS to enter information about a client who you will not enroll into program
- Search for the client
- At the agency level select the **NOTES** Tab (you will be redirected to a different screen)
- Use the plus symbol to **ADD NOTE**



Entering Case Notes - *For clients not enrolled in program*



This is an example, you can entitle the notes whatever is most appropriate and reflects the task completed. For example *Phone Call, Home Visit, Referral etc.*

This will allow you to track services provided prior to enrolling the client into the program.

**This note only applies to the client selected; have other clients within the household? Add a note by going to the individual client profile.*

Household Configuration

Household Configuration - *Create & Manage Members*

- By default, a newly created client record will not be associated with a Household.
- When you are on any tab within a client record, you will see the **Household Members** section at the top of the right sidebar.
- This section will list any active Household members associated with the client record. To manage the Household members, click the Manage button.

Household Configuration - *Create & Manage Members*

- Selecting the *Manage* icon/link at the top of the right sidebar will take you to the Household Management search screen.
- At this point if you recently entered the clients into HMIS you will see them in the **YOUR RECENT CLIENT SEARCHES ACCESSED**.
- You can select them from there - or if you do not see them, you can **SEARCH FOR A HOUSEHOLD MEMBER**.
- Using the plus sign that appears next to the name will allow you to add the client as a Household Member.

Administering & Entering the HPAT Assessment

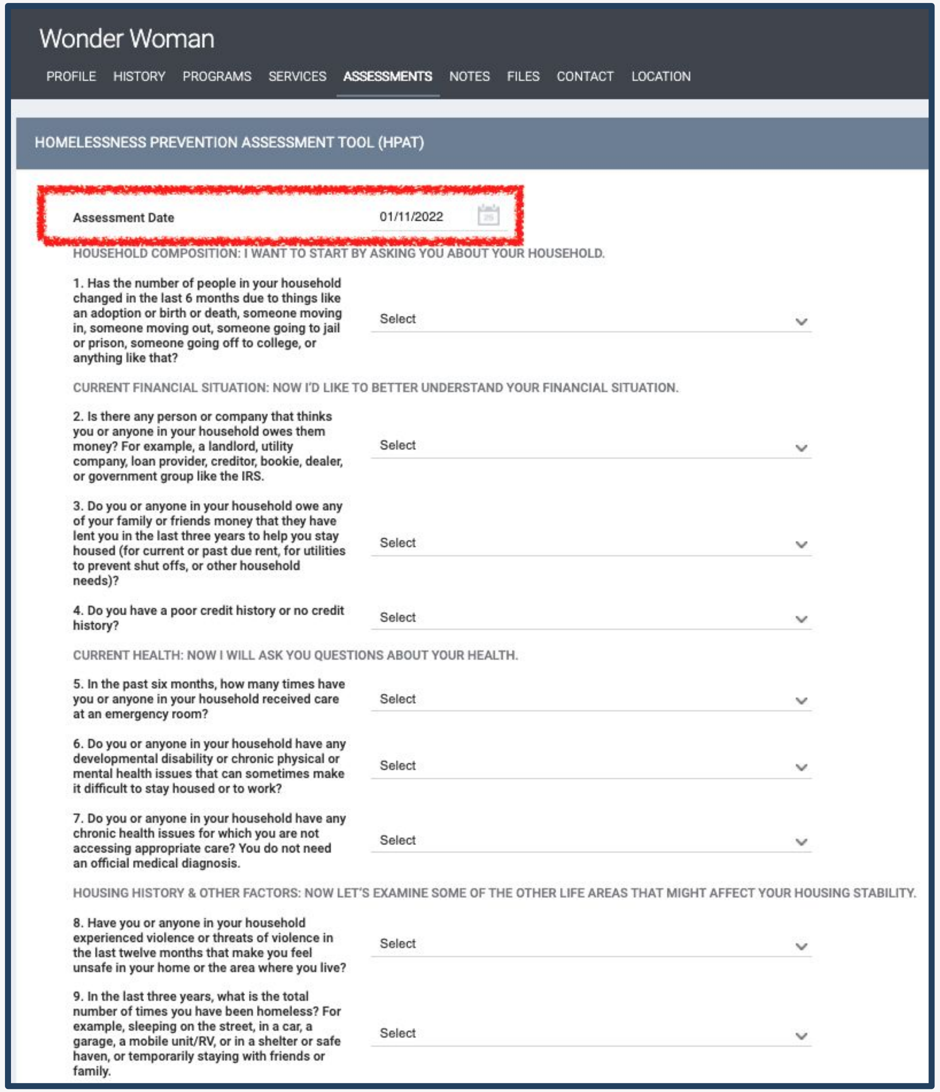
Administering & Entering the HPAT Assessment

The Homeless Prevention Assessment Tool (HPAT) is located in the **ASSESSMENTS Tab** at the Agency Level

- The HPAT assessment can only be administered by End Users that have completed the required training
- HPAT has replaced the PR-VI-SPDAT
- There is only one HPAT; unlike the PR-VI-SPDAT there is no single or family
- Resources for the HPAT can be found here

Administering & Entering the HPAT Assessment

- Select **START** when ready to proceed with administering the HPAT
- Please be sure to enter a response for each question
- Please note you will need to enter the Name and Phone Number of Staff Completing the HPAT
  - *At some agencies data entry is completed by a different staff person; please ensure the name of the person who provided the HPAT is listed.*
- When done select **SAVE**


Wonder Woman

PROFILE HISTORY PROGRAMS SERVICES ASSESSMENTS NOTES FILES CONTACT LOCATION

HOMELESSNESS PREVENTION ASSESSMENT TOOL (HPAT)

Assessment Date 01/11/2022

HOUSEHOLD COMPOSITION: I WANT TO START BY ASKING YOU ABOUT YOUR HOUSEHOLD.

1. Has the number of people in your household changed in the last 6 months due to things like an adoption or birth or death, someone moving in, someone moving out, someone going to jail or prison, someone going off to college, or anything like that? Select

CURRENT FINANCIAL SITUATION: NOW I'D LIKE TO BETTER UNDERSTAND YOUR FINANCIAL SITUATION.

2. Is there any person or company that thinks you or anyone in your household owes them money? For example, a landlord, utility company, loan provider, creditor, bookie, dealer, or government group like the IRS. Select

3. Do you or anyone in your household owe any of your family or friends money that they have lent you in the last three years to help you stay housed (for current or past due rent, for utilities to prevent shut offs, or other household needs)? Select

4. Do you have a poor credit history or no credit history? Select

CURRENT HEALTH: NOW I WILL ASK YOU QUESTIONS ABOUT YOUR HEALTH.

5. In the past six months, how many times have you or anyone in your household received care at an emergency room? Select

6. Do you or anyone in your household have any developmental disability or chronic physical or mental health issues that can sometimes make it difficult to stay housed or to work? Select

7. Do you or anyone in your household have any chronic health issues for which you are not accessing appropriate care? You do not need an official medical diagnosis. Select

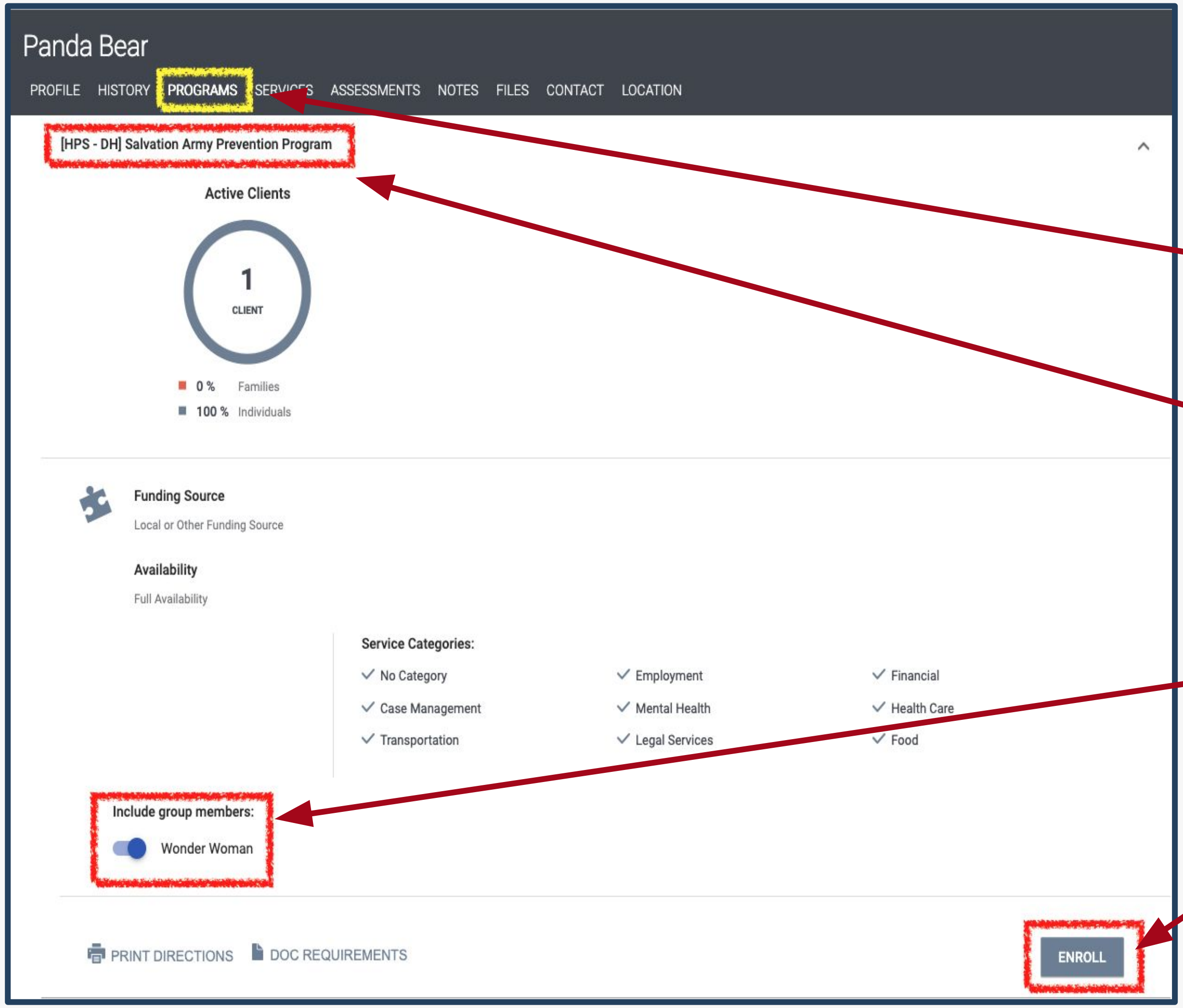
HOUSING HISTORY & OTHER FACTORS: NOW LET'S EXAMINE SOME OF THE OTHER LIFE AREAS THAT MIGHT AFFECT YOUR HOUSING STABILITY.

8. Have you or anyone in your household experienced violence or threats of violence in the last twelve months that make you feel unsafe in your home or the area where you live? Select

9. In the last three years, what is the total number of times you have been homeless? For example, sleeping on the street, in a car, a garage, a mobile unit/RV, or in a shelter or safe haven, or temporarily staying with friends or family. Select

Enrolling Household in Program

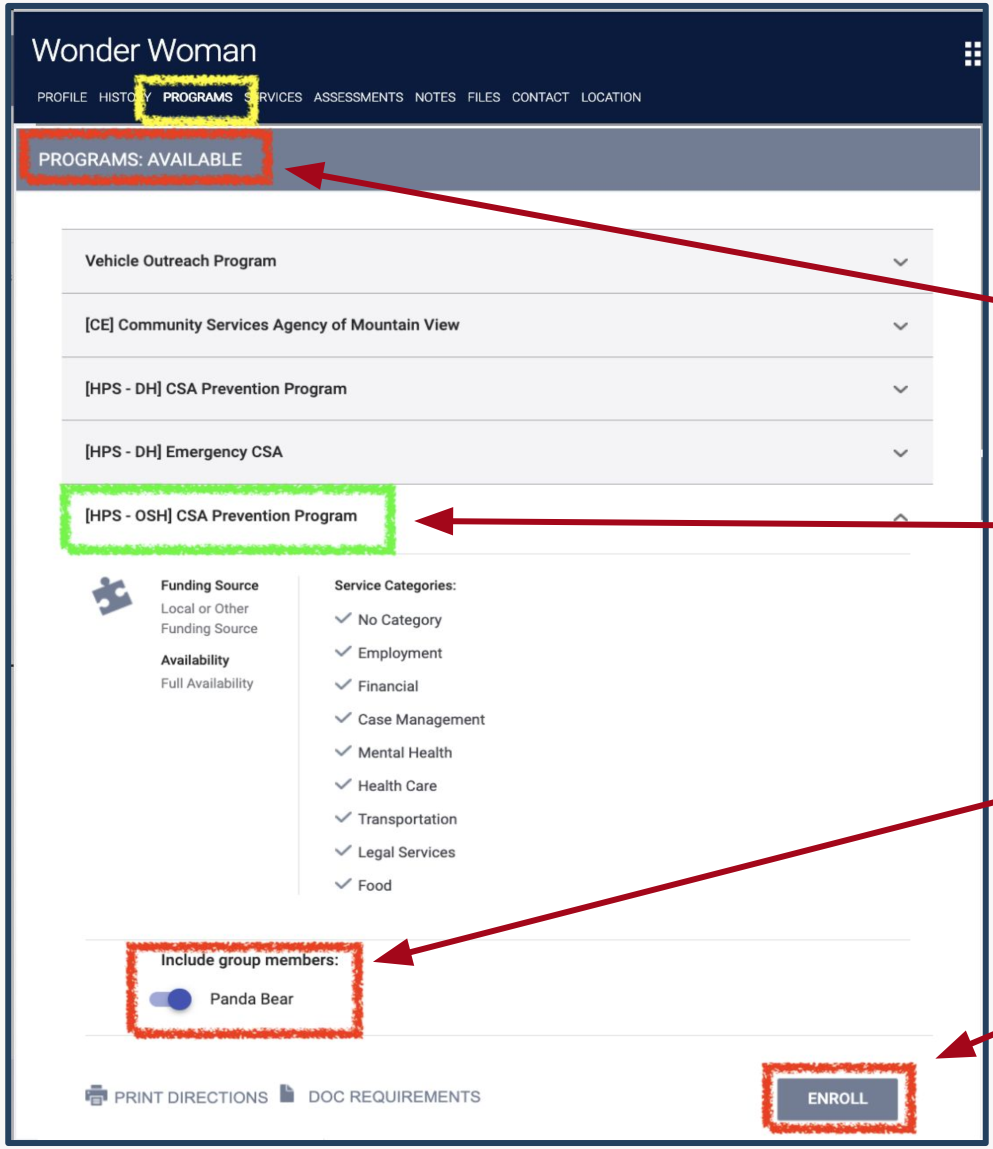
Enrolling Household in [HPS] Program



If you are accepting the household into your program, complete the enrollment screen for each household member in HMIS

- From the head of household's profile screen click on the **PROGRAMS** tab
- Choose the **[HPS-DH] Salvation Army Prevention Program** or appropriate prevention program
- Click the toggle to **Include group members** (household members)
- Click **ENROLL** and complete the intake information for each member of the household

Enrolling Household in [HPS] Program



If you are accepting the household into your program, complete the enrollment screen for each household member in HMIS

From the head of household's profile screen click on the **PROGRAMS** tab

Choose the **[HPS-OSH] CSA Prevention Program** or appropriate prevention program

Click the toggle to **Include group members** (household members)

Click **ENROLL** and complete the intake information for each member of the household

Enrolling Household in [HP] Program

Additional Notes regarding program enrollment:

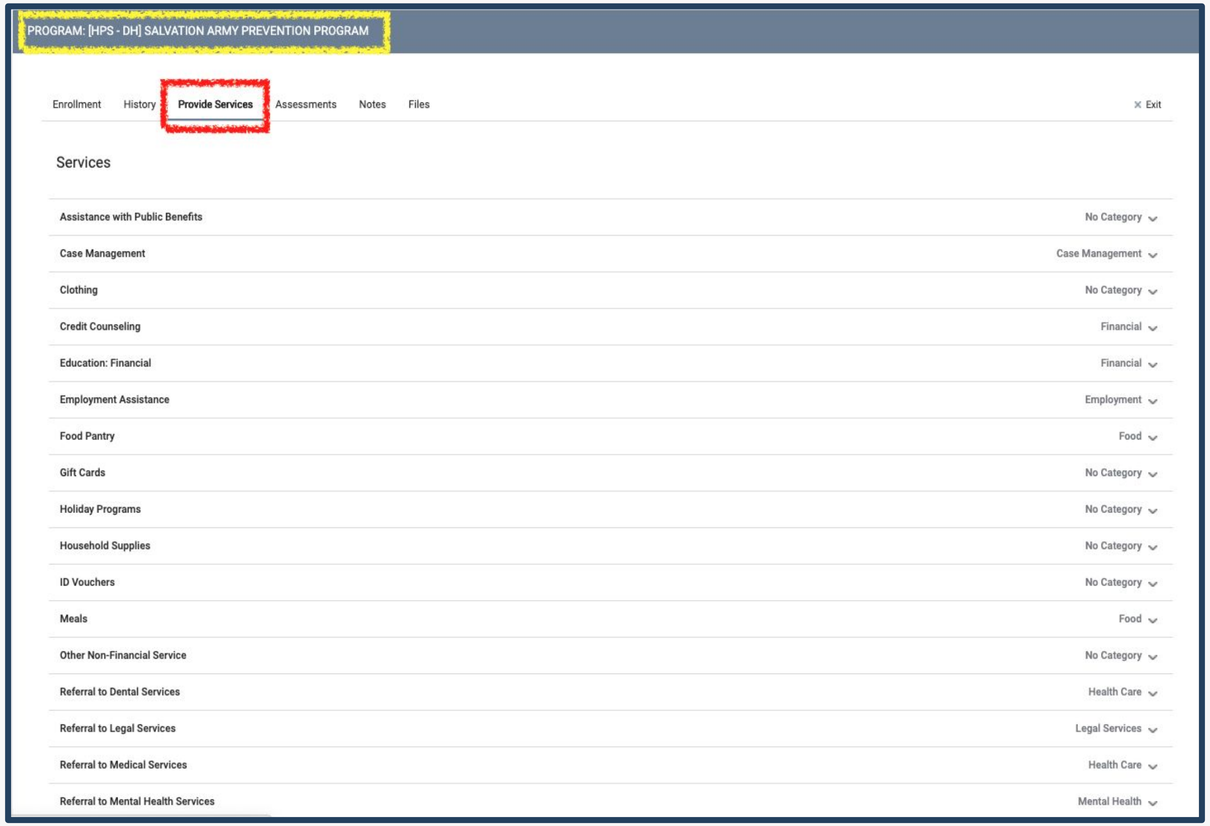
Project Start Date = *the date the client was approved for enrollment*

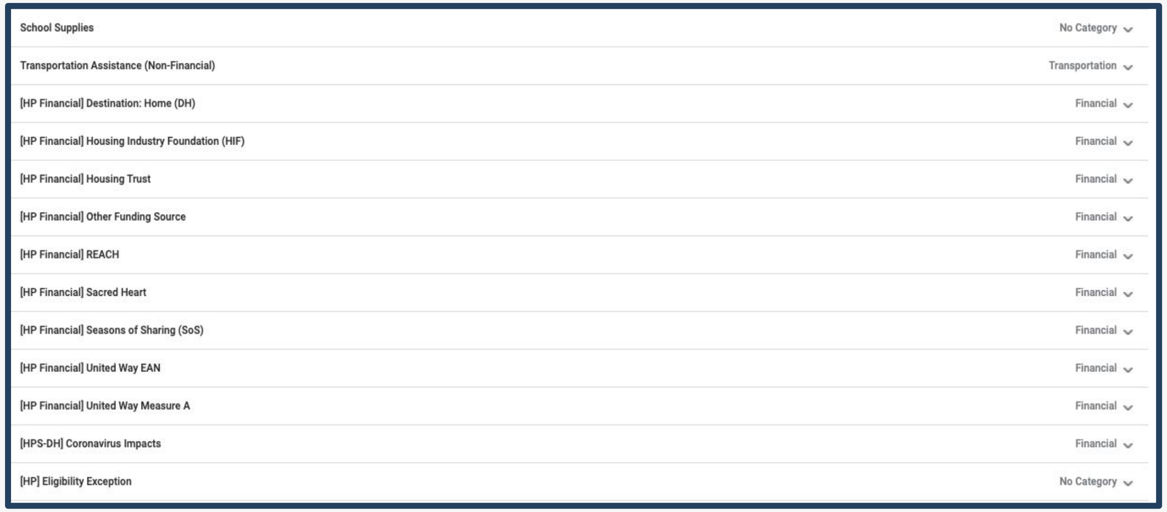
** For some agencies it might be the date the case was approved before receiving either case management or financial assistance. If unsure, ask your manager about the location of the approval date in the file.*

Providing Services (at the program level)

Providing Services within [HPS] Program Enrollment

- Once the client is enrolled in the appropriate program add services under **PROVIDE SERVICES** TAB
- A list of services will appear
- Select the appropriate service





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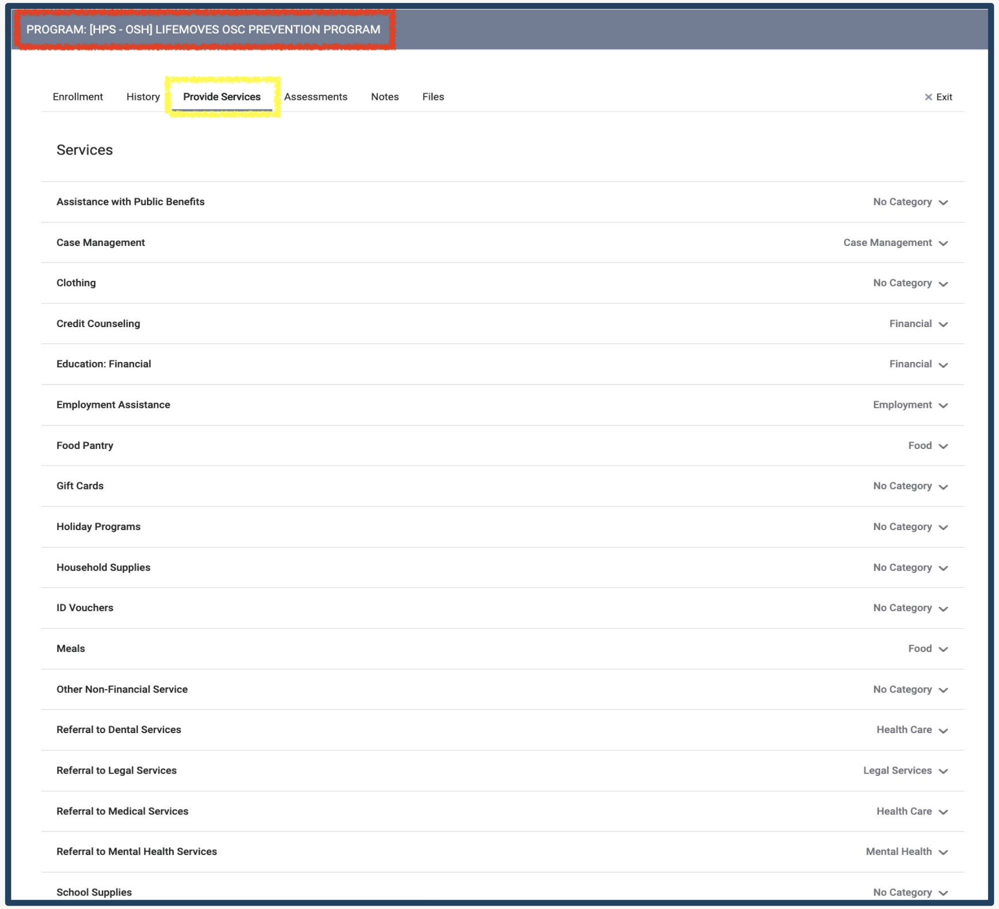
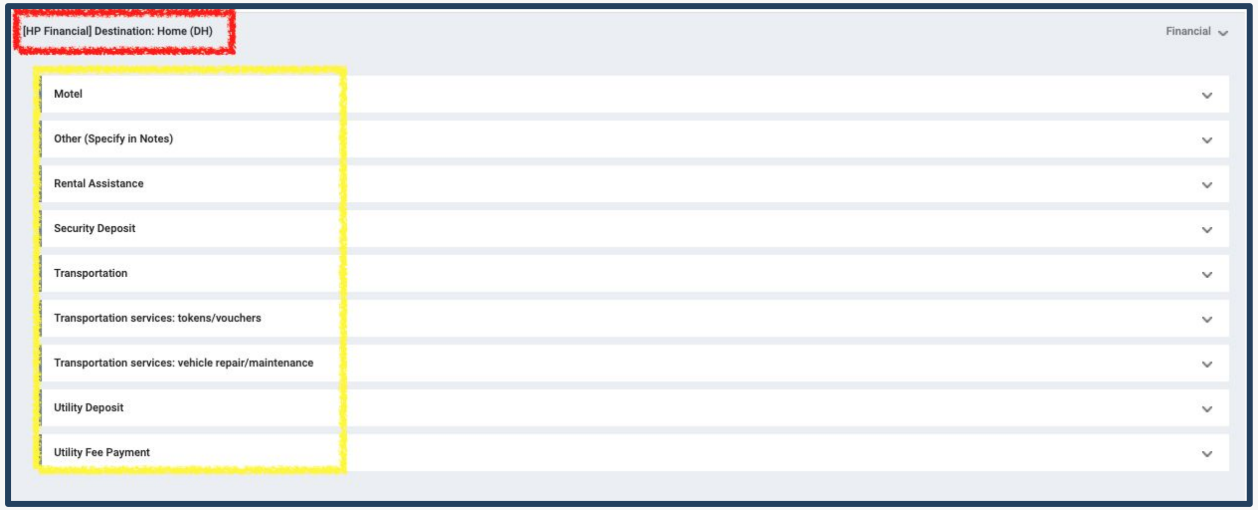


Providing Services within [HPS] Program Enrollment

Provide financial or non-financial services

1. Select the Service and enter related information
2. **Enter financial services under the head of household only**:
    a. Choose funding source (e.g. Destination: Home, SoS, HIF)
    b. Choose type of assistance (e.g. Rental Assistance, Security Deposit)
    c. Fill out Start Date, End Date, and Expense Date as the date listed on the check
    d. Fill out Expense Amount
    e. If an "Other" funding source or type of assistance was provided, specify what type in the Notes section



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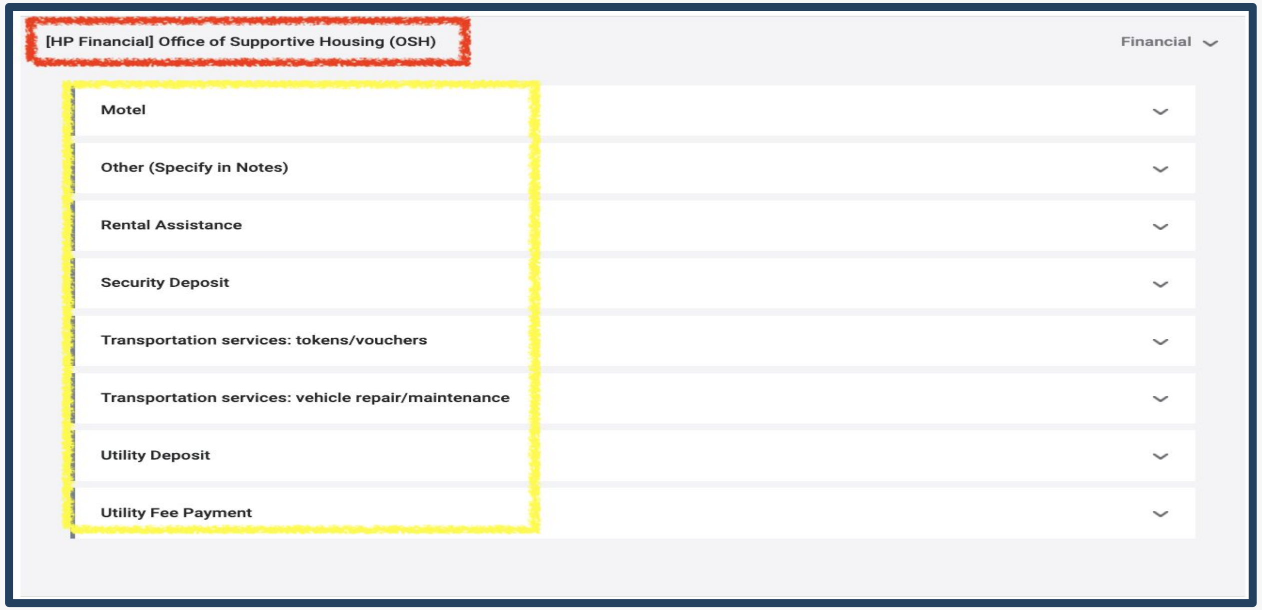
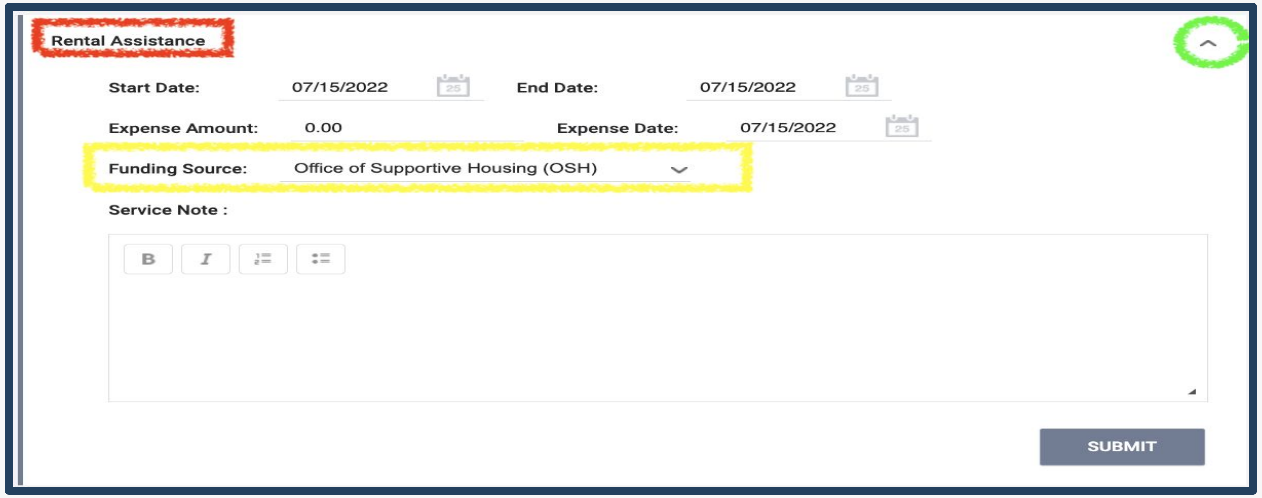




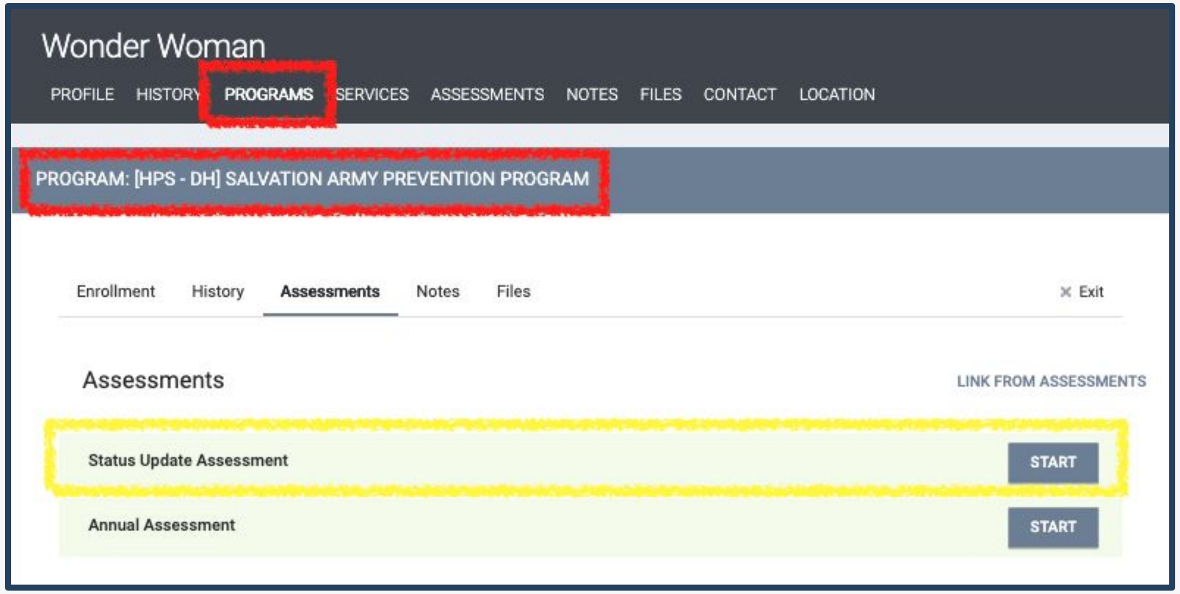
Administering & Entering the Status Update

Administering & Entering the Status Update

How Do I conduct a Status Assessment?

If the household's or client's status has changed (e.g. household becomes homeless, income or benefits change), record the change in HMIS:

1. Create **Status Update Assessment** for each member affected
    a. This is located under the program enrollment in the **Assessments Tab**
2. If household loses housing, change Housing Status and update Current Residence to match the new living situation
3. Record any changes to income, benefits, health insurance, disabling conditions



Exiting Household (from program)

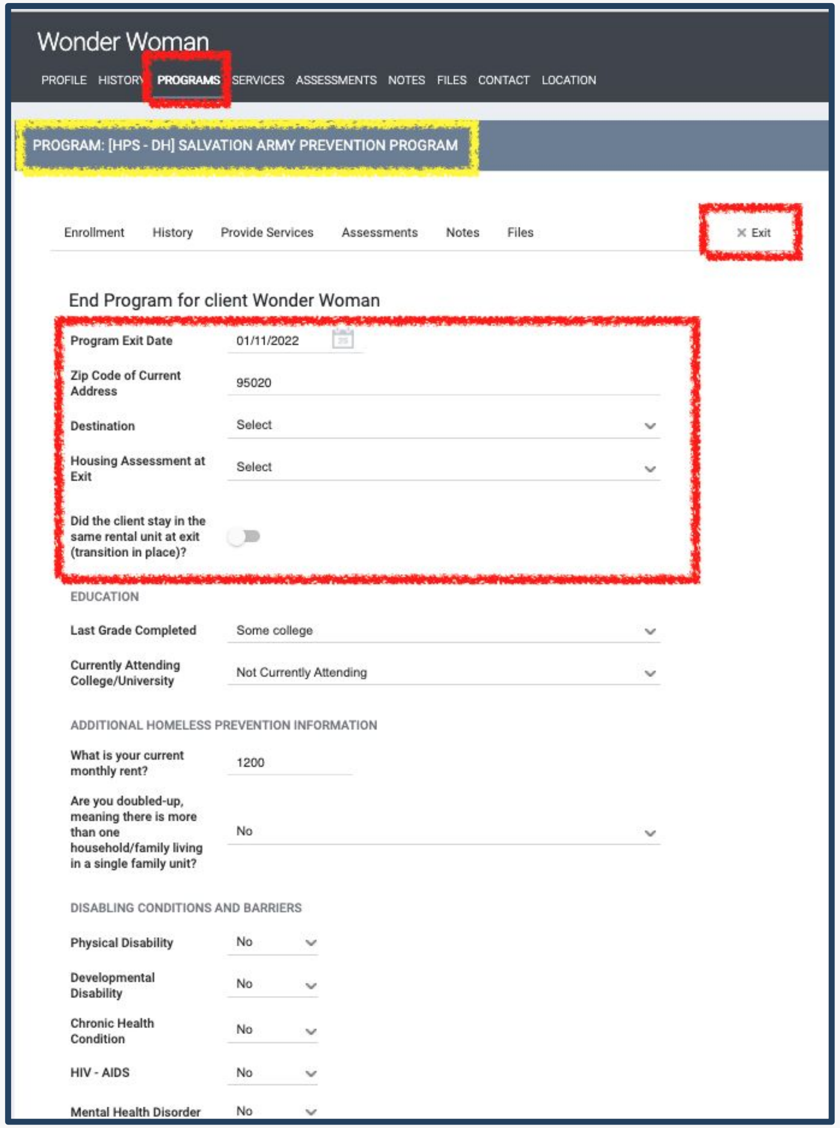
Exiting Household- *How Do I Exit a Client from a Program?*

When the household leaves, exit them from the program in HMIS:

1. Fill out household's exit destination
   a. Project Exit Date
      - The date a client last receives financial services or the date a client meets with a case manager to agree to end services. Whichever date is the latest.
      - If the client loses touch with the case manager, end date should be last date of communication with the client or the last financial service recorded. Whichever date is the latest.

   b. Destination- reported by client during exit interview or information reported during the last contact with the client.
   c. Housing Assessment at Exit - asks if household maintained the same rental unit as they started with, or if they moved out
   d. Subsidy Information - if exiting to a rental unit, specify if it has an ongoing subsidy
2. Review the other exit questions and update with any changes

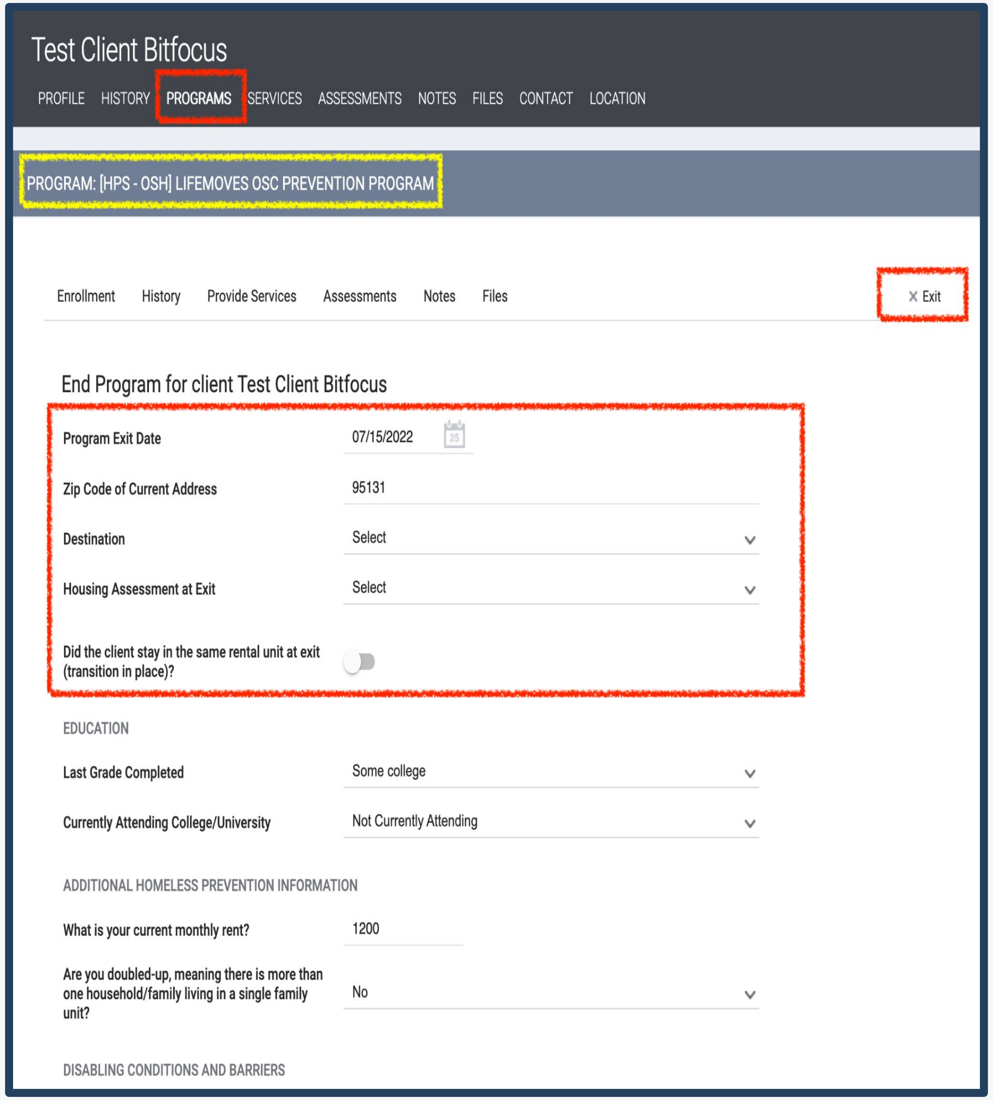
Exiting Household- *How Do I Exit a Client from a Program?*



Exiting a Household

- When exiting a household, the option to exit several household members will appear.
- Toggle the switch next to the member(s) you wish to exit.
- You can select all clients to be exited from the enrollment, or a smaller subset.
- Once you click the **END PROGRAM** button, the exit screens for the clients you selected will be displayed in sequence for each household member.

Exiting Household- *How Do I Exit a Client from a Program?*



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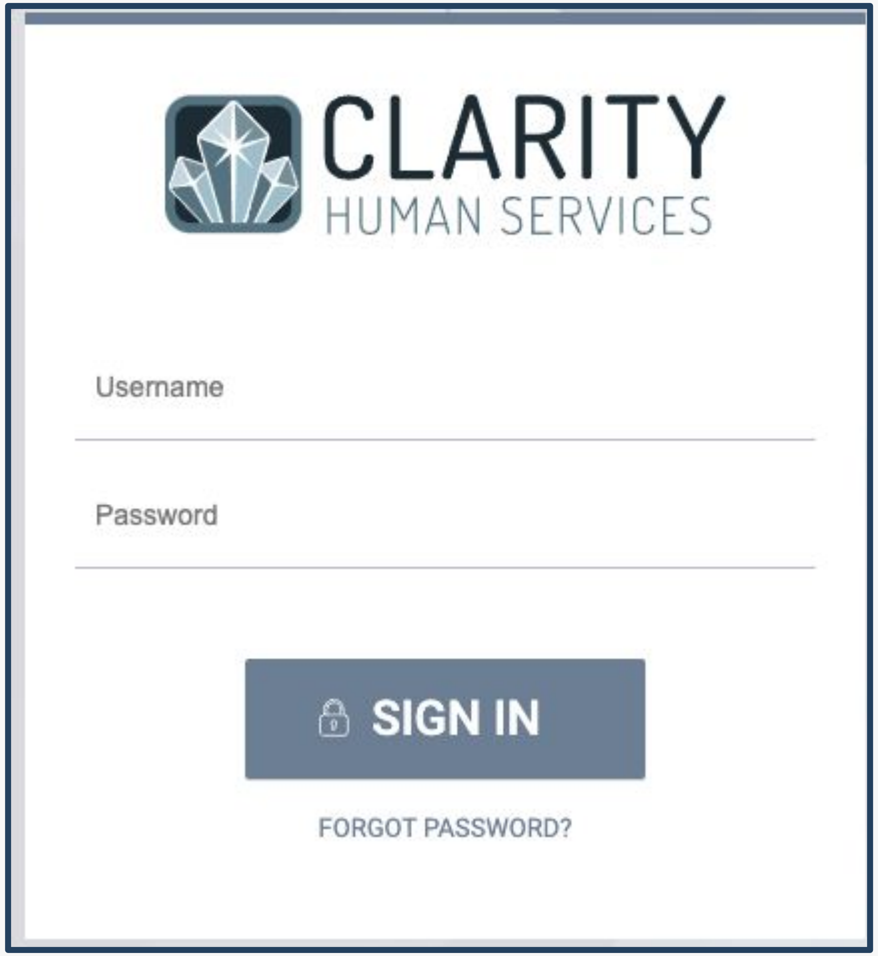
Live Demonstration

Live Demonstration…SCC HMIS Training Site



Questions, Comments, Concerns?

Please contact the Help Desk:
sccsupport@bitfocus.com

Want to practice entering this workflow before moving to the live site?

Test your skills on the SCC Training Site

Need HMIS HPS Forms check them out here!

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